



Introduction to Social Impact Reporting

Our Team



Sara Ansell

Manager of Customer
Success



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Our Approach

What are the benefits to funders?



Communicating Impact

- Standardized indicators
- Best available data
- Claim of impact



More Support

Our Approach

What are the benefits to nonprofits?



Comprehensive and Concise

- Use logic model template to forecast and report to your end outcomes using best available data



Credible and Sharable

- Share success stories and lessons learned
- Share with other stakeholders



Simple and Supported

- Step-by-step guidance, custom feedback, and easy cloning

Reporting Sections

Consider time blocking each section to keep your reporting to a two hour effort.


Overview	Name, description, start/end date of report, logo, and report stage. <i>If relevant, refer to funder-specific guidelines regarding what type of report to create.</i>
Intervention	Social category, type of intervention, frequency and duration of engagement, and description (text).
Beneficiaries	Location, demographic categories (%), description (text). <i>Where possible, please provide gender, ethnicity, social and economic status percentages.</i>
Outcomes	Logic model template, relevant indicators, indicator customization, backup documentation, notes. <i>If relevant, refer to funder-specific guidance on logic model templates.</i>
Budget	Direct (cash, in-kind) and overhead (cash, in-kind), backup documentation, notes.
Narrative	Success stories, lessons learned (final report only).

Overview Impact Model Narrative Finances
👍 Ratings 🖨️

Of the donors supporting this program, display Impact Receipt for:

TEST ORG (\$500,000.00) ▼

Teaching for Equity and Justice



We engage young people in deep civic learning by providing challenging content through a process that builds knowledge, skills, and dispositions. Our classes integrate the study of history and literature with ethical decision-making and innovative teaching strategies.

Location:
Chicago, IL, USA; Boston, MA, USA; Oakland, CA, USA; Dallas, TX, USA; Detroit, MI, USA; New York, NY, USA

Content updates:

Jun 30, 2021
Program start
Jun 30, 2022
Program end

Impact Receipt® for...
TEST ORG

Investment:
\$500,000.00

Report Stage:
Initial

Last Updated:
08 Oct 2021

Portion Funded
71%
of total cost

Investment Type
Foundational
from options: incremental, significant, or foundational

Funder's Claim (enabled all of the outcomes, including...)
750 people gain safe and affirming environments
1,000 strengthen their civic engagement



True Impact Reporting Process

Initial / Interim Forecast



Creating an Account & Allocating Investment

Use Credentials Shared Via Email

Use credentials in the invitation to create your account or login to an existing account.

This is your invitation to create an account at www.trueimpact.com/signup, or log into your existing account at www.trueimpact.com/login. Note that you are the only one from your organization who has received this notification email.

Please report on your program's targets or actual outcomes for the following investment:

Organization:

Program:

Investment:

Step One: Initial Social Impact Report

- Create a new True Impact reporting account at www.trueimpact.com/signup to accept the investment and create a new report. When reporting or projecting your outcomes, you will be asked to define both your outcome goals and your measurement plans to track progress towards those goals. These initial outcome projections will be saved in your report as a forecast.
- Within approximately one week of submitting your draft Initial Report, you will receive feedback on your forecast from True Impact.
- Upon receipt of our feedback, you'll have five days to update your initial report. Once you've updated your initial report with our feedback, your initial report will be shared with your funder.

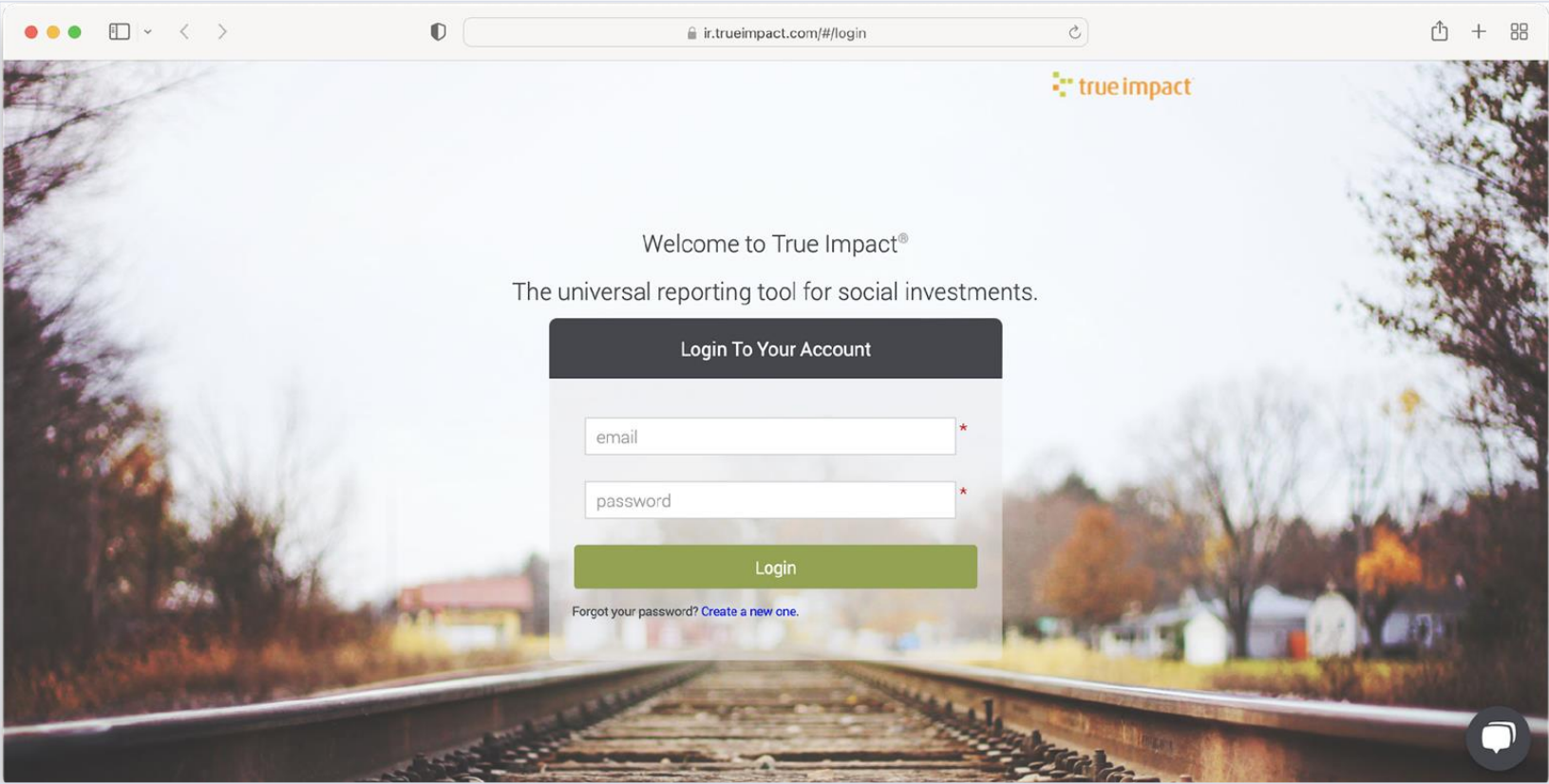
Step Two: Final Social Impact Report

- 30 days following the completion of your grant agreement or report period, please update your initial report with final results. This update will be your final report.

If you have any questions during the final reporting process, I'm here to help.

Sign Up or Login

Use credentials in the invitation to create your account or login to an existing account.



Add Users

Add additional users once the account is created, or share a PDF with your team and stakeholders.

Share the account

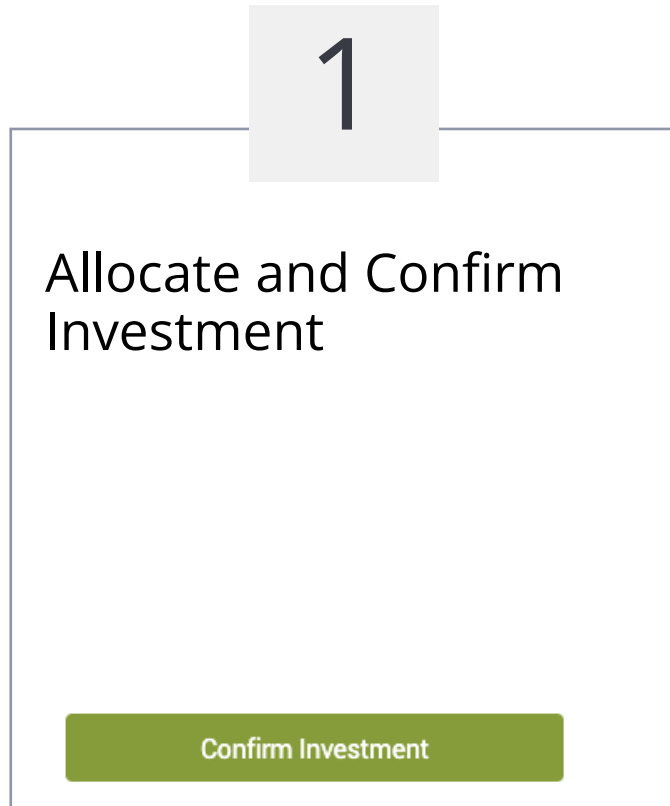
- In Left navigation bar, click ACCOUNT
- Click Manager Users
- Click + Add User button
- Include collaborators

Share a PDF

- In Left navigation bar, click Investments
- Click on print icon to print your report

Name	E-mail	Job Title	Role
North Way	smiller+demograntee@trueimpact.com		admin
Emerson Sarmiento	esarmiento+demograntee@trueimpact.com		admin
Sara Ansell	sansell+demograntee2@trueimpact.com		admin
Farron Levy	flevy+demograntee2@trueimpact.com		admin
Sadie Miller	smiller+demo@trueimpact.com		admin
Chelsea Takamine	demograntee2@trueimpact.com		admin
Sadie Miller	sadie.miller+demo@gmail.com	Director, Client Success	admin
Gabe Cohen	gcohen+demonpo@trueimpact.com	Director, Marketing	admin
Rondi Johnson	rjohnson+grantee@trueimpact.com		admin
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Yuvika Koul	ykoul+npo@trueimpact.com		admin

Allocate the Investment



Allocate the Investment

1

Allocate and Confirm Investment

Confirm Investment

2

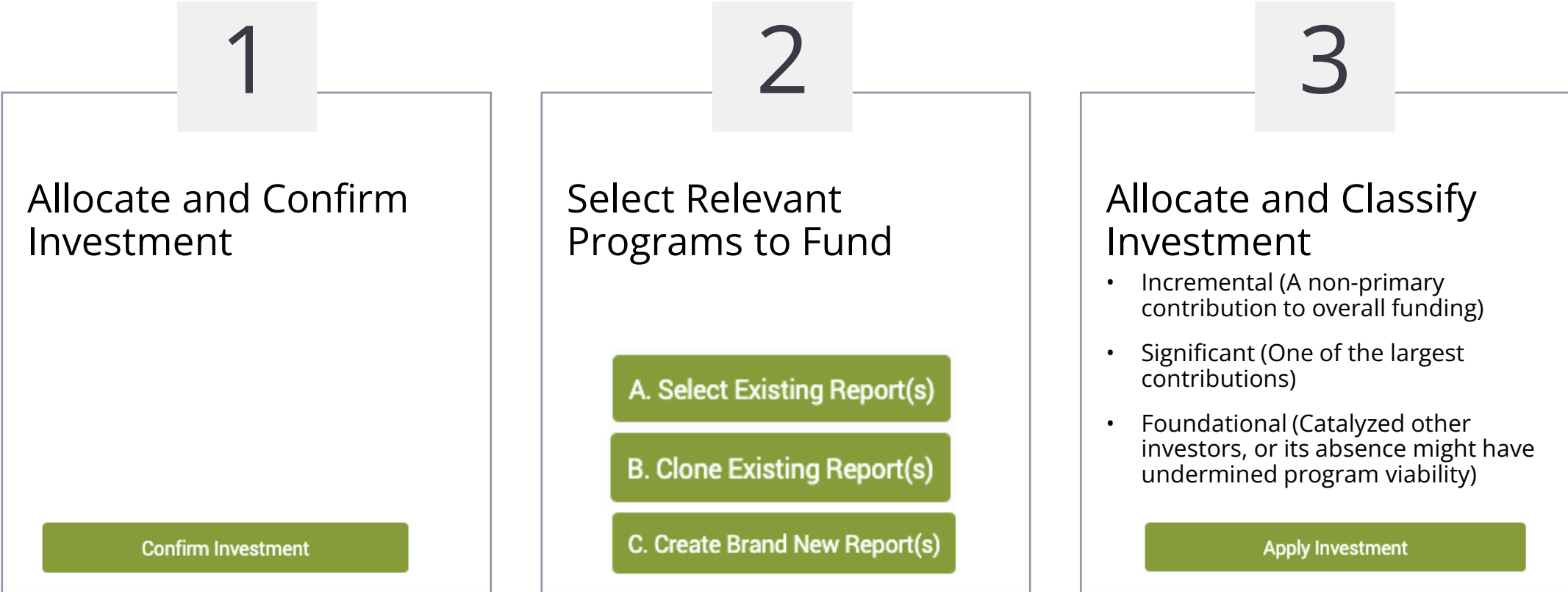
Select Relevant Programs to Fund

A. Select Existing Report(s)

B. Clone Existing Report(s)

C. Create Brand New Report(s)

Allocate the Investment



Update Your Report

Your new report shows up in Reports to be submitted or published.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/todo`. The dashboard is divided into two main sections:

- Investments to be allocated: 0**
All investments have been allocated!
- Reports to be submitted or published: 6**

Program or Initiative Name / Funding Term	Report Status	Content Status
1. SAMPLE Food Security Jul-01-2020 to Jun-30-2021	Final Report (TI Feedback Provided)	Overview, Intervention, Beneficiaries, Outcomes, Budget, Narratives (all complete)
2. General Operations Jul-01-2021 to Jul-01-2022	Interim Report (Not Yet Submitted for Review)	Overview, Intervention, Beneficiaries, Outcomes, Budget (all complete)
3. Teaching for Equity and Justice Jun-30-2021 to Jun-30-2022	Initial Report (Not Yet Submitted for Review)	Overview, Intervention, Beneficiaries, Outcomes, Budget (all complete)
4. Global Poverty Jan-04-2022 to Jan-28-2022	Initial Report (Not Yet Submitted for Review)	Overview, Intervention, Beneficiaries (all complete)

The 'Content Status' column for the first three reports shows a grid of green checkmarks indicating completion. The 'Update' button for the third report is highlighted with a dashed orange box. A chat bubble icon is visible in the bottom right corner of the dashboard.

Submitting a Report

Describe Your Program

Name and describe the program.

- If this is a *gala, luncheon, or general operations grant*, report on your total programmatic efforts.
- If this is a *convention*, describe the event and its outcomes on participants and organizations.

The screenshot shows the True Impact report wizard interface. The browser address bar displays `ir.trueimpact.com/#report-wizard/7327/overview/description`. The page title is "Teaching for Equity and Justice ('21 - '22)". The status is "Initial Report" and "Not Yet Submitted for Review". The program manager is "Chelsea Takamine". The left sidebar shows a navigation menu with "OVERVIEW" selected, and sub-items: Name, Description, Date Range, Logo, and Stage. The main content area is titled "Briefly describe Teaching for Equity and Justice" and contains three bullet points with lightbulb icons: "Provide sufficient detail so a person unfamiliar with the program will have a general understanding of how it works and what it's trying to achieve.", "Here's a good way to start: 'We help [this group of beneficiaries] achieve [this successful outcome] by providing [these services, activities, or resources].' Then add details.", and "Use the present tense (e.g., 'We help...' instead of 'We will help...') so your wording is appropriate for any reporting stage." Below these points is a text input field containing the text: "We engage young people in deep civic learning by providing challenging content through a process that builds knowledge, skills, and dispositions. Our classes integrate the study of history and literature with ethical decision-making and innovative teaching strategies." Below the text field, it says "63 words remaining." and a green checkmark icon with the text "Page entries are valid." At the bottom, there are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >". A "More Info" button is on the right side of the page.

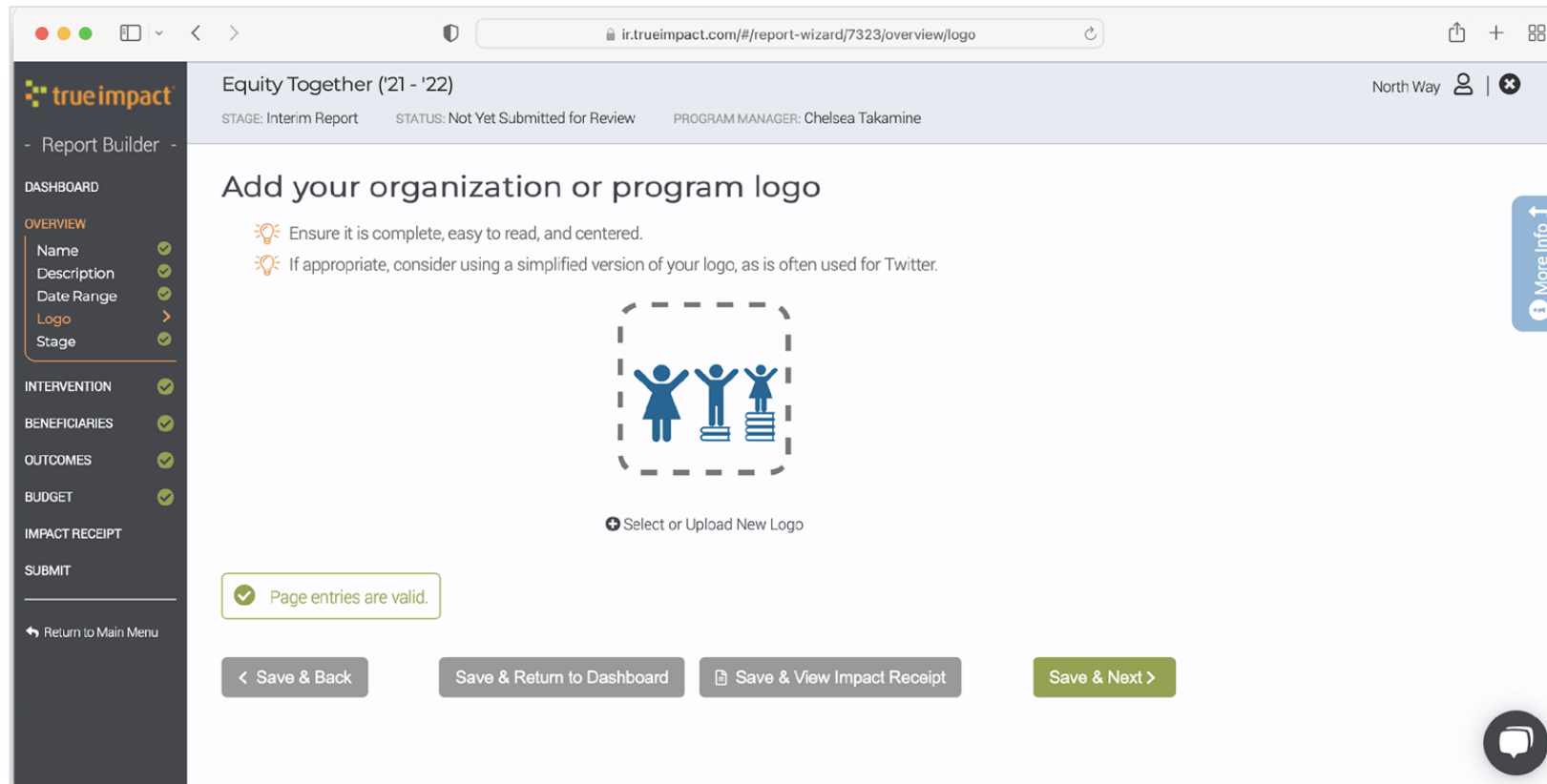
Include Program Implementation Dates

Consider the report date range as bookends of your report.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7323/overview/date-range`. The page title is "Equity Together ('21 - '22)". The user is logged in as "North Way". The page displays the "Date Range" section of a report builder. The main heading is "What is the time period you are reporting on?". Below this, there are three informational tips: 1. "Most programs report for a single year of operations, even if they have multi-year commitments from donors (unless it's a new program still in development, or a multi-year education initiative)." 2. "If this is a continuously operating program, consider using the calendar year or your organization's fiscal year." 3. "If this report is for a donation made to a fundraiser, report on the dates of program being funded, not the fundraiser." The "Report Start Date" is set to "01 Jul 2021" and the "Report End Date" is set to "01 Jul 2022". The duration is calculated as "366 Days". A green checkmark indicates "Page entries are valid." At the bottom, there are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >". A sidebar on the left contains navigation options: "Dashboard", "Overview" (with sub-items: Name, Description, Date Range, Logo, Stage), "Intervention", "Beneficiaries", "Outcomes", "Budget", "Impact Receipt", and "Submit". A "Return to Main Menu" link is at the bottom of the sidebar. A "More Info" button is on the right side of the main content area.

Add a Small Logo

Twitter logos work great!



The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7323/overview/logo`. The page title is "Equity Together ('21 - '22)". The status is "Interim Report" and "Not Yet Submitted for Review". The program manager is "Chelsea Takamine". The user is logged in as "North Way".

The main heading is "Add your organization or program logo". Below it, there are two lightbulb icons with text: "Ensure it is complete, easy to read, and centered." and "If appropriate, consider using a simplified version of your logo, as is often used for Twitter." A dashed box contains a blue icon of three stylized figures (two adults and one child) standing on a stack of books. Below the box is the text "Select or Upload New Logo".

A green checkmark icon and the text "Page entries are valid." are displayed in a box. At the bottom, there are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >". A "More Info" button is on the right side, and a chat icon is at the bottom right.

Select Your Implementation Stage

Select the current stage of your program.



Initial Forecast (i.e., the program has not started, or is just starting, so the content represents your 'best guess' of what will be achieved)

Select Your Implementation Stage

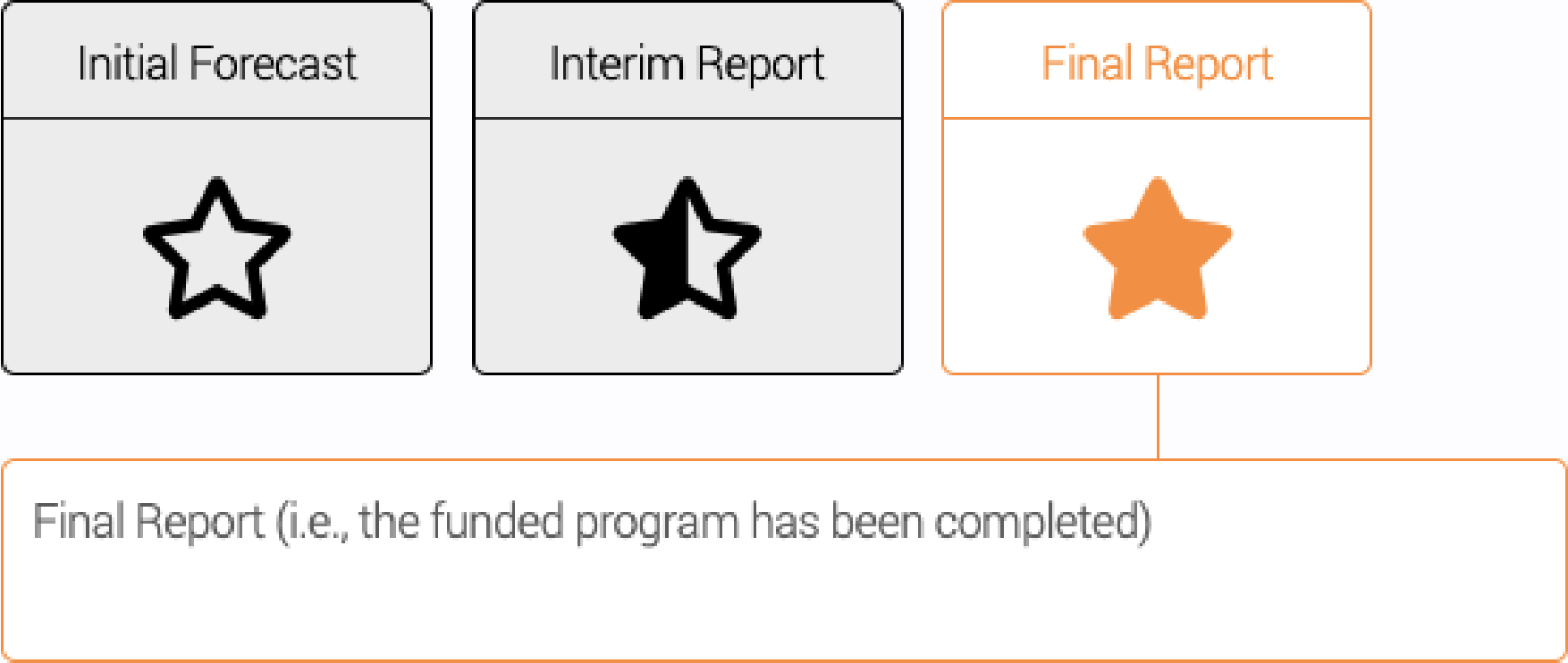
Select the current stage of your program.



Interim Report (i.e., the funded program is in progress, and the content has been updated to contain your latest expectations of what will be achieved)

Select Your Implementation Stage

Select the current stage of your program.



What do you do?

Select your cause, intervention approach, duration and intensity, and program details.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/intervention/core-service`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The page status is "STAGE: Initial Report", "STATUS: Not Yet Submitted for Review", and "PROGRAM MANAGER: Chelsea Takamine".

The main content area is titled "What is Teaching for Equity and Justice's primary social cause?". It includes two lightbulb icons with text: "If your program could be reasonably be placed in multiple categories, choose the one you consider most important or fundamental" and "Your selection should also represent your most relevant peer group (for sharing best practices among similar organizations)".

Below the text is a "Reset To Original" button and a list of social causes with icons: Agriculture, fishing and forestry; Animal welfare (domesticated); Arts and culture; Community and economic development; Disasters and emergency management; Education; Environment; Health; and Housing.

The left sidebar contains a navigation menu with sections: DASHBOARD, OVERVIEW (checked), INTERVENTION (with sub-items: Core Service (selected), Type, Frequency & Duration, Additional Information (checked)), BENEFICIARIES (checked), OUTCOMES (checked), BUDGET (checked), IMPACT RECEIPT, and SUBMIT. A "Return to Main Menu" link is at the bottom of the sidebar.

On the right side of the main content area, there is a "More Info" button and a chat icon.

Where do you serve?

Identify your program locations.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/beneficiaries/locations`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The report stage is "Initial Report", the status is "Not Yet Submitted for Review", and the program manager is "Chelsea Takamine".

The main heading is "What location(s) does Teaching for Equity and Justice serve?". Below this are two instructions:

- Report at the city level if possible, but if the service area is larger than that, report at the county, state, province, region, or country level, as appropriate.
- To ensure your location is recognized by our system, select an option from the autocomplete list that generates under the field you are typing in.

There are five input fields for service locations, each with a trash icon to its right:

- Service Location (1) *
- Service Location (2) *
- Service Location (3) *
- Service Location (4) *
- Service Location (5) *

The left sidebar contains a navigation menu with the following items:

- Report Builder
- DASHBOARD
- OVERVIEW ✓
- INTERVENTION ✓
- BENEFICIARIES
 - Locations >
 - Demographics ✓
 - Description ✓
- OUTCOMES ✓
- BUDGET ✓
- IMPACT RECEIPT
- SUBMIT
- Return to Main Menu

On the right side, there is a "More Info" button and a chat icon.

Who benefits from your work?

Select all relevant demographic categories.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/beneficiaries/demographics`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The interface includes a sidebar with navigation options: Dashboard, Overview, Intervention, Beneficiaries (Locations, Demographics, Description), Outcomes, Budget, Impact Receipt, and Submit. The main content area is titled "Describe the demographics of the beneficiaries served by Teaching for Equity and Justice". It contains three lightbulb icons with instructions: "Select all demographic categories you can reasonably report on, to addresses the varying interests of different funders that may view this report.", "Be as precise as possible in reporting your percentages, but estimates are fine.", and "Report only on the target 'end beneficiaries' of your program; do not include intermediaries or service providers." Below these instructions is a table with columns "Demographic" and "Percentage", and a "+ add/edit demographic" button. A warning message states: "At least one beneficiary demographic is required." Below this is a red warning box: "You have categorized only a portion of your beneficiaries. Please consider adding more detail." and a "Dismiss/Not Relevant" link. At the bottom, there are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >".

Demographics don't need to equal 100%
Don't leave any blank

Who benefits from your work?

Add any notes relevant to your beneficiaries, and dismiss alerts if not relevant.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/beneficiaries/description`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The page status is "Initial Report" and "Not Yet Submitted for Review", with "PROGRAM MANAGER: Chelsea Takamine".

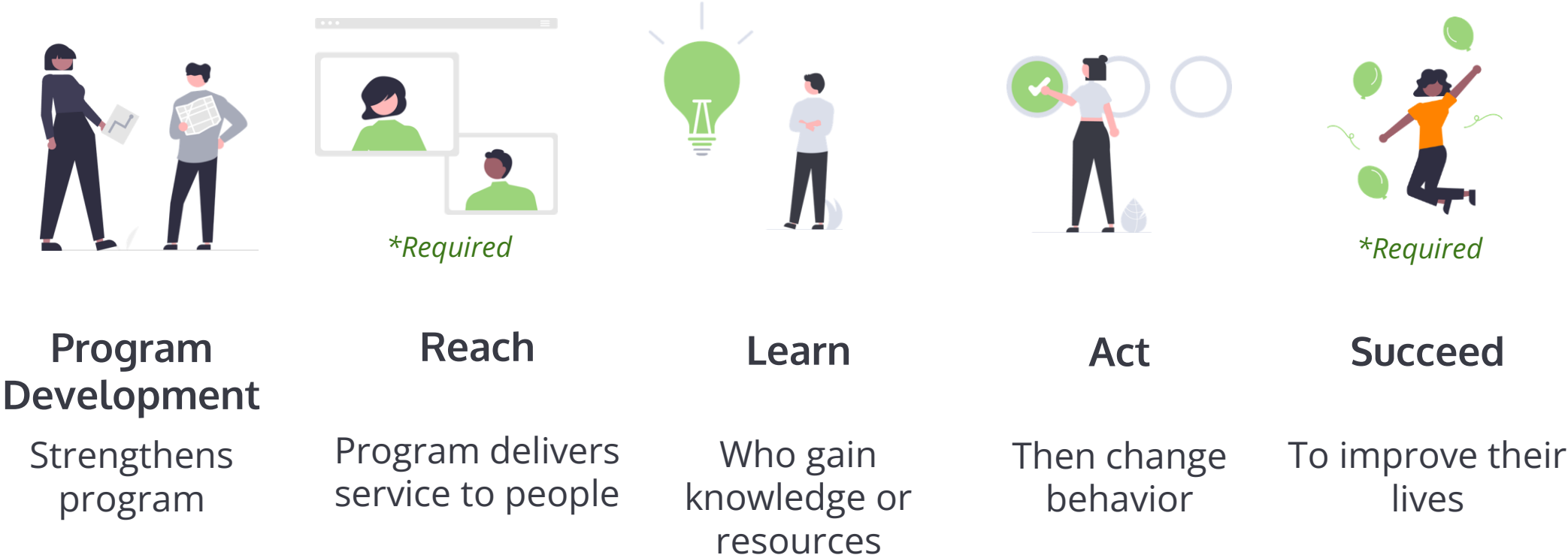
The left sidebar contains a navigation menu with the following items: "Report Builder", "DASHBOARD", "OVERVIEW" (checked), "INTERVENTION" (checked), "BENEFICIARIES" (highlighted), "Locations", "Demographics", "Description" (selected), "OUTCOMES" (checked), "BUDGET" (checked), "IMPACT RECEIPT", and "SUBMIT". A "Return to Main Menu" link is at the bottom of the sidebar.

The main content area has the heading "Briefly provide any additional descriptive information on the beneficiaries served by Teaching for Equity and Justice". Below this are two lightbulb icons with text: "This is an opportunity to provide a more detailed picture of the people whose lives are being improved by your program, which can make your social impact report more relatable and compelling to readers." and "Report only on the target 'end beneficiaries' of your program; do not include intermediaries or service providers." A text input field contains the text: "Students served attend local public schools representing a diversity of economic and racial backgrounds." Below the field, it says "236 words remaining." and a green checkmark icon with the text "Page entries are valid." is displayed.

At the bottom of the main area are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >". A "More Info" button is on the right side, and a chat icon is in the bottom right corner.

Our Logic Model Approach

True Impact uses a 5 stage logic model to define success and measure outcomes.



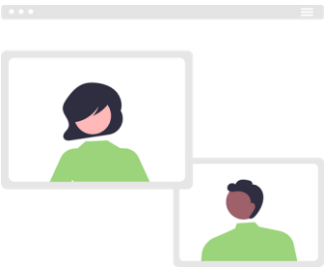
Logic Model Example

Consider how the model could be used for program focusing on social emotional learning.



Program Development

Staff trained



Reach

Students reached



Learn

Students learn skills, motivation



Act

Students change their behavior



Succeed

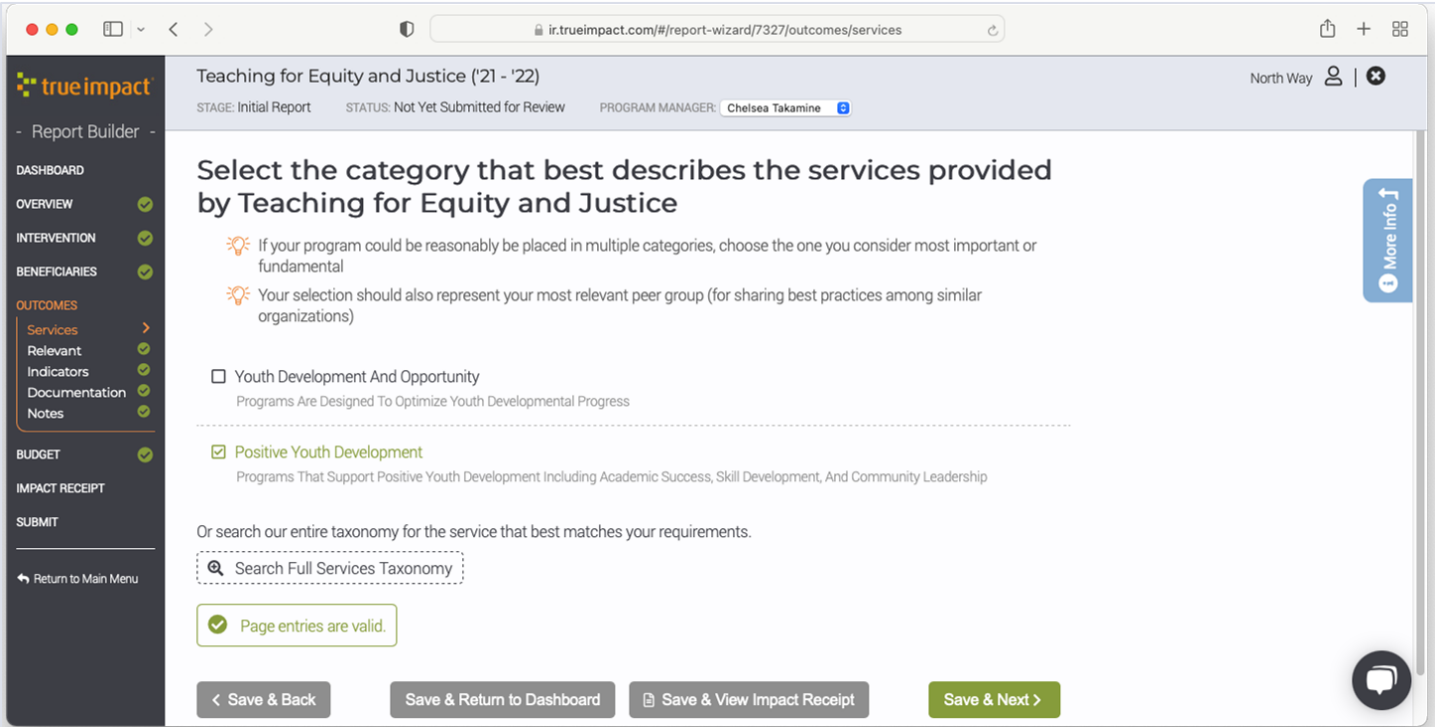
Students improve school attendance
Students succeed in school

Select Your Logic Model

Select the most appropriate model to align with your program approach.

Key steps in the outcomes section

- ✓ Select indicators in Outcomes > Relevant
- ✓ Define threshold of success
- ✓ Define measurement approach



Select Program Development Indicators

This includes new policies, programs, resources developed, or collaborations expanded.

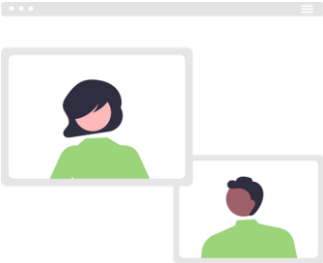


Program Development Strengthens program

A screenshot of the True Impact report wizard interface. The browser address bar shows 'ir.trueimpact.com/#/report-wizard/7327/outcomes/relevant'. The page title is 'Teaching for Equity and Justice ('21 - '22)'. The status is 'Finalized' and the program manager is 'Chelsea Takamine'. The left sidebar shows a navigation menu with 'Report Builder' at the top, followed by 'DASHBOARD', 'OVERVIEW', 'INTERVENTION', 'BENEFICIARIES', 'OUTCOMES' (with sub-items: Services, Relevant, Indicators, Documentation, Notes), 'BUDGET', 'IMPACT RECEIPT', and 'SUBMIT'. The main content area is titled 'Select the relevant results at each stage' and includes two bullet points: 'Include all significant expected results, regardless of your ability to measure them.' and 'Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones.' Below this is a flow diagram for the 'Positive Youth Development Impact Model' showing the path: PROGRAM DEVELOPMENT (highlighted) -> REACHED -> LEARN -> ACT -> SUCCEED (SOCIAL IMPACT). The 'Select your relevant Program Development performance indicators:' section contains three options: 'Tools/Systems/Other Infrastructures Developed, Enhanced' (unchecked), 'Staff/Volunteers/Implementers Added, Trained' (checked), and 'Programs Or Services Created, Enhanced' (unchecked). A 'More Info' button is on the right side of the page.

Select Reach Indicator

The number of people who are served or participate.



Reach

Program delivers service to people

A screenshot of the True Impact web application interface. The browser address bar shows 'ir.trueimpact.com/#/report-wizard/7327/outcomes/relevant'. The page title is 'Teaching for Equity and Justice ('21 - '22)'. The user is identified as 'North Way'. The interface includes a sidebar menu with options like 'Dashboard', 'Overview', 'Intervention', 'Beneficiaries', 'Outcomes', 'Budget', and 'Impact Receipt'. The 'Outcomes' section is expanded, showing 'Services', 'Relevant', 'Indicators', 'Documentation', and 'Notes'. The main content area displays instructions for selecting relevant results at each stage, specifically for the 'Reached' stage of the 'Positive Youth Development Impact Model'. A checkbox for 'People Reached' is selected, with a description: 'Number Of Beneficiaries That Participate In, Or Are Directly Served By, The Program.' Navigation buttons for 'Back', 'Return to Dashboard', 'Impact Receipt', and 'Next' are visible at the bottom. A confirmation message at the bottom left states 'Page entries are valid.' A 'More Info' button is on the right side, and a chat icon is in the bottom right corner.

Select Learn Indicator (if relevant)

The number of people who gain the skills, knowledge, or access to improve their wellbeing.



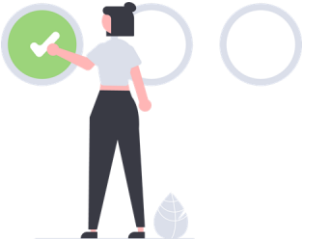
Learn

Who gain knowledge or resources

The screenshot shows the True Impact report wizard for 'Teaching for Equity and Justice ('21 - '22)'. The interface includes a sidebar with navigation options: DASHBOARD, OVERVIEW, INTERVENTION, BENEFICIARIES, OUTCOMES (with sub-items: Services, Relevant, Indicators, Documentation, Notes), BUDGET, IMPACT RECEIPT, and SUBMIT. The 'OUTCOMES' section is expanded to 'Relevant'. The main content area displays the title 'Teaching for Equity and Justice ('21 - '22)' and the program manager 'Chelsea Takamine'. Below this, it says 'Select the relevant results at each stage' and provides two guidelines: 'Include all significant expected results, regardless of your ability to measure them.' and 'Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones.' The current stage is 'Positive Youth Development Impact Model', and the progress bar shows 'PROGRAM DEVELOPMENT' → 'REACHED' → 'LEARN' (highlighted) → 'ACT' → 'SUCCEED (SOCIAL IMPACT)'. A box titled 'Select your relevant Learn performance indicators:' contains one selected indicator: 'Beneficiaries Gain Capacity, Motivation' with a description: 'Number Of People That Gain The Skills, Knowledge, Access To Resources, Appreciation, Or Motivation To Pursue The Program's Intended Social Impact Goals.' At the bottom, there are buttons for 'Back', 'Return to Dashboard', 'Impact Receipt', and 'Next >'. A green checkmark message at the bottom left states 'Page entries are valid.'

Select Act Indicator (if relevant)

The number of people who take action or change behavior to improve their wellbeing.



Act

Then change behavior

Select Success Indicators

The number of people who success or gain health, safety, wellbeing.



Succeed
To improve
their lives

A screenshot of the True Impact web application interface. The browser address bar shows 'ir.trueimpact.com/#/report-wizard/7327/outcomes/relevant'. The page title is 'Teaching for Equity and Justice ('21 - '22)'. The status is 'Finalized' and the program manager is 'Chelsea Takamine'. The main heading is 'Select the relevant results at each stage'. Below this, there are two lightbulb icons with text: 'Include all significant expected results, regardless of your ability to measure them.' and 'Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones.' A progress bar shows 'PROGRAM DEVELOPMENT' followed by 'REACHED', 'LEARN', 'ACT', and 'SUCCEED (SOCIAL IMPACT)'. The 'SUCCEED (SOCIAL IMPACT)' step is highlighted. Below the progress bar, a section titled 'Select your relevant Succeed (Social Impact) performance indicators:' contains a list of indicators with checkboxes: 'Community Leaders Activated, Strengthened', 'People Gain Safe And Affirming Environments' (checked), 'Graduate High School', and 'Access Post-Secondary Education'. A sidebar on the left lists navigation options: DASHBOARD, OVERVIEW, INTERVENTION, BENEFICIARIES, OUTCOMES (with sub-items: Services, Relevant, Indicators, Documentation, Notes), BUDGET, IMPACT RECEIPT, and SUBMIT. A 'More Info' button is on the right side of the page.

Indicators: What do you mean?

Define your success, including the threshold or level of achievement for the indicator.

The screenshot displays the True Impact web application interface. The browser address bar shows the URL: `ir.trueimpact.com/#/report-wizard/7327/outcomes/indicators/Capacity-Developed/2`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is identified as "North Way".

The left sidebar contains a navigation menu with the following items:

- Report Builder
- DASHBOARD
- OVERVIEW
- INTERVENTION
- BENEFICIARIES
- OUTCOMES
 - Services
 - Relevant
 - Indicators
 - Documentation
 - Notes
- BUDGET
- IMPACT RECEIPT
- SUBMIT
- Return to Main Menu

The main content area shows a progress bar for "PROGRAM DEVELOPMENT (400)" with a sub-progress for "REACHED (2,500)". Below this, the indicator "400 Staff/Volunteers/Implementers Added, Trained" is defined. The description includes:

Success Criteria: Number of trained teachers are more confident and skilled at fostering students' academic, civic, and social and emotional learning.

How are you measuring this indicator (once the program is fully implemented): Objective assessment of program development gains reported by program implementers (e.g., based on surveys or tests using specific, predefined evaluation criteria).

Please describe your sources/assumptions: We will implement a survey at the end of program participation to understand what the teachers learned through participation.

The interface also shows a "Step 1: Define program development" section with a text input field containing the text: "Number of trained teachers are more confident and skilled at fostering students' academic, civic, and social and emotional learning." A "Next Step" button is located below the input field.

Indicators: How many?

Forecast the number who achieve this indicator.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/outcomes/indicators/Capacity-Developed/2`. The page title is "Teaching for Equity and Justice ('21 - '22)". The interface includes a sidebar menu with options like Dashboard, Overview, Intervention, Beneficiaries, Outcomes, Budget, Impact Receipt, and Submit. The main content area displays a progress bar for "PROGRAM DEVELOPMENT (400)" leading to "REACHED (2,500)", "LEARN (500)", "ACT (400)", and "SUCCEED (SOCIAL IMPACT) (1,000)". A specific indicator is highlighted: "1 | 400 Staff/Volunteers/Implementers Added, Trained". Below this, there is a description of the indicator, success criteria, measurement methods, and source assumptions. A form section shows "Step 1: Define program development" with a "Current Forecast" input field containing the value "400" and a "Next Step" button.

Indicators: How do you know?

Categorize your measurement as directly measured, estimated, or guess.

The screenshot shows the True Impact Report Wizard interface. The browser address bar displays the URL: `ir.trueimpact.com/#/report-wizard/7327/outcomes/indicators/Capacity-Developed/2`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is identified as "North Way". The page status is "STAGE: Initial Report", "STATUS: Not Yet Submitted for Review", and "PROGRAM MANAGER: Chelsea Takamine".

The main content area shows a progress bar with the following steps: PROGRAM DEVELOPMENT (400) → REACHED (2,500) → LEARN (500) → ACT (400) → SUCCEED (SOCIAL IMPACT) (1,000). The "PROGRAM DEVELOPMENT (400)" step is highlighted.

The "Success Criteria" section states: "Number of trained teachers are more confident and skilled at fostering students' academic, civic, and social and emotional learning." The "Please describe your sources/assumptions" section states: "We will implement a survey at the end of program participation to understand what the teachers learned through participation."

The "Step 3: Categorize measurement" section asks: "How will you determine the actual number of capacities gained for your Jun 30, 2021-Jun 30, 2022 final report?"

Three buttons are available for categorization: "Guess" (with a question mark icon), "Estimate (From Data)" (with a line graph icon), and "Directly Measured" (with a scales of justice icon). A "Reset To Original" button is also present.

The left sidebar contains the following navigation items: Dashboard, Overview, Intervention, Beneficiaries, Outcomes (Services, Relevant, Indicators, Documentation, Notes), Budget, Impact Receipt, and Submit. A "Return to Main Menu" link is also visible.

Indicators: Share Tools (optional)

Upload relevant measurement instruments and tools, if available.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#report-wizard/7327/outcomes/indicators/Capacity-Developed/2`. The page title is "Teaching for Equity and Justice ('21 - '22)". The interface includes a sidebar on the left with a navigation menu: "true impact", "Report Builder", "DASHBOARD", "OVERVIEW", "INTERVENTION", "BENEFICIARIES", "OUTCOMES" (with sub-items: Services, Relevant, Indicators, Documentation, Notes), "BUDGET", "IMPACT RECEIPT", "SUBMIT", and "Return to Main Menu". The main content area shows a progress bar with steps: "PROGRAM DEVELOPMENT (400)", "REACHED (2,500)", "LEARN (500)", "ACT (400)", and "SUCCEED (SOCIAL IMPACT) (1,000)". Below the progress bar, there is a text input field for "How are you measuring this indicator (once the program is fully implemented):" and a "Please describe your sources/assumptions:" section. A list of steps is shown: "Step 1: Define program development", "Step 2: Quantify program development", "Step 3: Categorize measurement", and "Step 4: Upload backup". Step 4 includes instructions to upload a tracking, testing, or survey tool and a "Add Files" button. A list of acceptable file types is provided: ".doc, .docx, .odt, .pdf, .xls, .xlsx, .ods, .ppt, .pptx and .txt". A "Next Step" button is at the bottom of the steps. The top right of the page shows "North Way" and a user profile icon.

Indicators: Describe Measurement

Describe how the data will be collected.

Teaching for Equity and Justice ('21 - '22)

STAGE: Initial Report STATUS: Not Yet Submitted for Review PROGRAM MANAGER: Chelsea Takamine

North Way | [User Icon]

PROGRAM DEVELOPMENT (400) → REACHED (2,500) → LEARN (500) → ACT (400) → SUCCEED (SOCIAL IMPACT) (1,000)

- Step 1: Define program development [+ Show all indicator fields](#)
- Step 2: Quantify program development
- Step 3: Categorize measurement
- Step 4. Upload backup
- Step 5. Describe process

Briefly describe how the capacity data will be collected, including who will do it, when, and how frequently.

We will implement a survey at the end of program participation to understand what the teachers learned through participation.

125 characters remaining.

Save & Next Indicator >

Add Context

This is an opportunity to upload relevant documents and add notes on your outcome model.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/outcomes/documentation`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The page content includes a sidebar menu with "true impact" logo and navigation items: "Report Builder", "DASHBOARD", "OVERVIEW", "INTERVENTION", "BENEFICIARIES", "OUTCOMES" (with sub-items: "Services", "Relevant", "Indicators", "Documentation", "Notes"), "BUDGET", "IMPACT RECEIPT", and "SUBMIT". The main content area has the heading "Upload documents that provide backup or context for your impact model (optional)". Below this is a dashed box labeled "Upload Document (or drag here)". A message states "Acceptable file types: .doc, .docx, .odt, .pdf, .xls, .xlsx, .ods, .ppt, .pptx and .txt". A green checkmark icon and the text "Page entries are valid." are displayed. At the bottom, there are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >". A "More Info" button is on the right side, and a chat icon is in the bottom right corner.

Provide a High Level Budget

Provide a total program budget of the program, and update your Investment Tier, if needed.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/budget/direct-cost`. The page title is "Teaching for Equity and Justice ('21 - '22)". The status is "Initial Report" and "Not Yet Submitted for Review". The program manager is "Chelsea Takamine".

The main heading is "What's the expected direct cost of implementing Teaching for Equity and Justice from Jun 30, 2021 to Jun 30, 2022?".

Instructions:

- Enter total cost, not just how a particular investment is being allocated.
- Enter the market value of any in-kind contributions (goods or services, such as volunteerism, office space, pro bono support).

Line Items	Current Forecast	Notes (contents of line item)
Direct Expenses	\$ 700,000	Direct program expenses
Direct In-Kind	\$ --	Enter notes for this expense category here.
TOTAL BUDGET	\$ 750,000	
ALL INVESTMENTS	\$ 500,000	

Below the table is a section titled "List of Current Investments" with the text "You can update the investment allocation tiers below." and a table with columns: Funder, Portfolio, Investment, Tier.

Add Budget Documentation

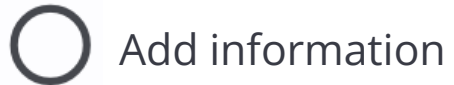
This is an optional opportunity to upload a detailed budget and any notes on budget changes.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/budget/documentation`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The page content includes a sidebar with navigation options: DASHBOARD, OVERVIEW, INTERVENTION, BENEFICIARIES, OUTCOMES, BUDGET (with sub-items: Direct Cost, Indirect Cost, Documentation, Notes), IMPACT RECEIPT, and SUBMIT. The main content area is titled "Upload documents that provide backup or context for your budget (optional)". It features an "Upload Document (or drag here)" button, a list of acceptable file types (.doc, .docx, .odt, .pdf, .xls, .xlsx, .ods, .ppt, .pptx, .txt), and a green confirmation message "Page entries are valid." Below this are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >". A "More Info" button is on the right, and a chat icon is in the bottom right corner.

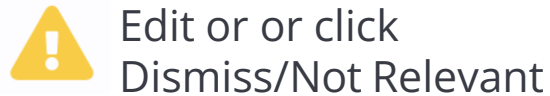
Review Dashboard



Complete



Add information



Edit or or click
Dismiss/Not Relevant




Error

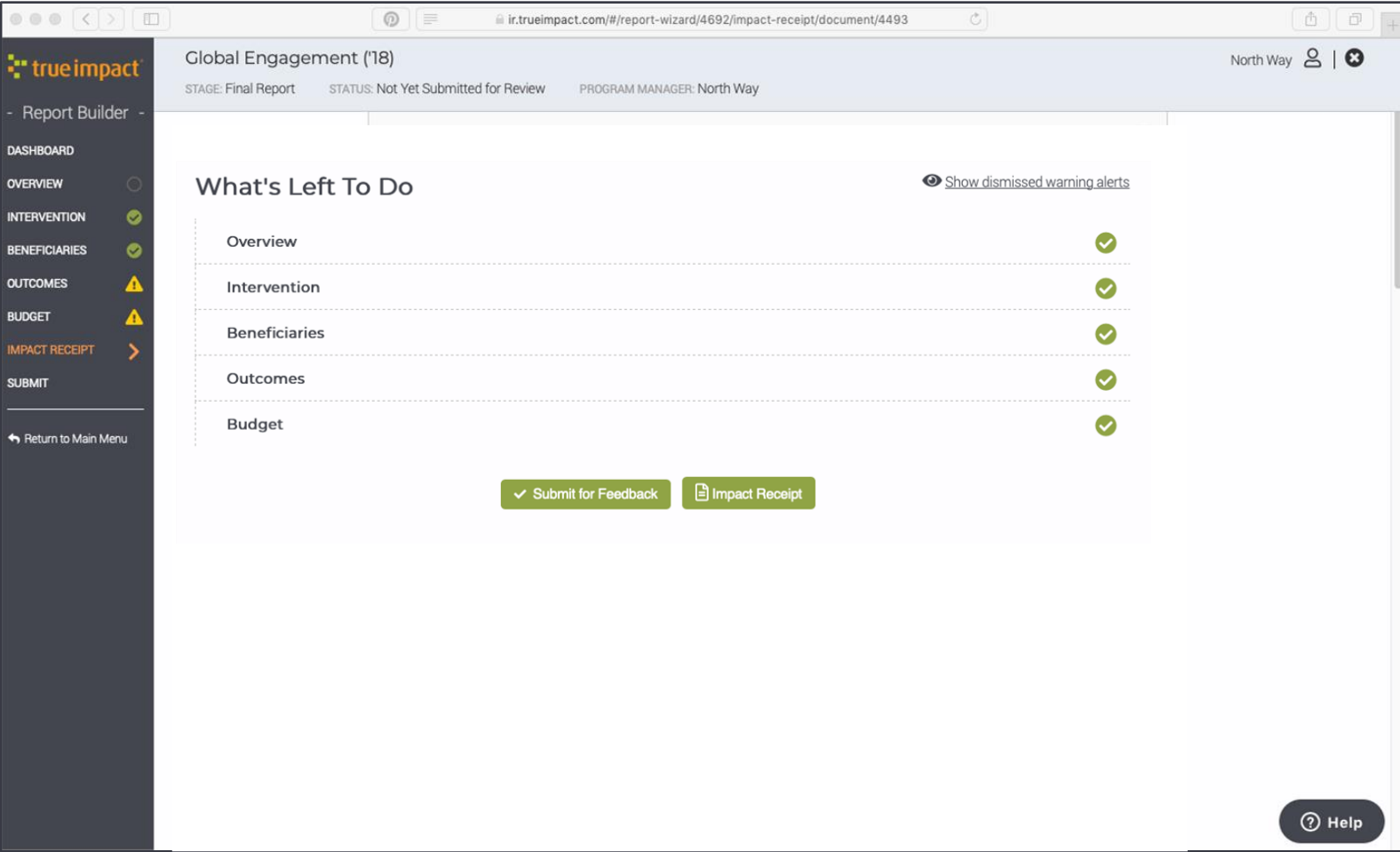
The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/4692/impact-receipt/document/4493`. The page title is "Global Engagement (18)". The user is logged in as "North Way". The dashboard is divided into several sections, each with a status indicator:

- Overview:** Status: Add information (empty circle). Message: "Date Range: An end date is required."
- Intervention:** Status: Complete (green checkmark).
- Beneficiaries:** Status: Complete (green checkmark).
- Outcomes:** Status: Add information (empty circle). Message: "Indicators: Your Act number is equal to at least one of your previous indicator entries. Most programs are not 100% effective at each stage. Does your entry here merit adjustment?"
- Budget:** Status: Error (red X). Message: "Total Cost: The value of the donations allocated to this program exceeds the budget. The budget must be increased and/or the value of allocated donations reduced."
- Custom Questions:** Status: Complete (green checkmark).

At the bottom of the dashboard, there are two buttons: "Submit for Feedback" and "Impact Receipt". A red error message at the bottom states: "Some data you have entered needs to be updated. It cannot be submitted as is. Check above to see what section has errors." A "Help" button is located in the bottom right corner.

Update Fields, Resolve Errors, and Submit

 Submit button becomes active when all sections are complete



The screenshot shows the True Impact report wizard interface. The browser address bar indicates the URL is ir.trueimpact.com/#/report-wizard/4692/impact-receipt/document/4493. The page title is "Global Engagement ('18)". The status is "STAGE: Final Report" and "STATUS: Not Yet Submitted for Review". The program manager is "North Way".

The left sidebar shows the navigation menu with the following items: "Report Builder", "DASHBOARD", "OVERVIEW", "INTERVENTION", "BENEFICIARIES", "OUTCOMES", "BUDGET", "IMPACT RECEIPT" (highlighted), and "SUBMIT".

The main content area is titled "What's Left To Do" and includes a link to "Show dismissed warning alerts". The list of sections to be completed is as follows:

Section	Status
Overview	✓
Intervention	✓
Beneficiaries	✓
Outcomes	✓
Budget	✓

At the bottom of the main content area, there are two buttons: "Submit for Feedback" (with a green checkmark icon) and "Impact Receipt".

A "Help" button is located in the bottom right corner of the interface.

- 01 Overview ✓ Do my dates represent program implementation?
- 02 Intervention ✓ Can an outside reader understand what the program does?
- 03 Beneficiary ✓ Have I represented who ultimately benefits from this work?
- 04 Outcomes
 - Relevant ✓ Do the indicators selected reflect the outcomes of my program?
 - Program Development ✓ Have I represented the new programs, resources, and implementers developed?
 - Reach ✓ Who my end beneficiary is, what they receive, and when they are engaged?
 - Learn ✓ Is my learn indicator specific and not duplicative of participation?
 - Act ✓ Is my Act indicator unique and represent a change in behavior?
 - Succeed ✓ Do positive social, economic, or environmental outcomes align with my program mission or end goals?
- 05 Documentation ✓ Can I provide more depth and context with an annual or program report?
- 06 Budget ✓ Does this represent how much it costs to enable the reported outcomes?



Updating a Report

Login to Your Account

Once True Impact completes feedback, return to update your report, resolve feedback, and submit for verification.

True Impact Report Feedback

Hi Sadie,

Teaching for Equity and Inclusion has received feedback. Please log in to review the comments and make adjustments to your report as appropriate.

If you've forgotten your password, or if your user account was set up for you and you didn't receive a password), you can reset it here: https://ir.trueimpact.com/?#/reset_login

Need help? Check how to resolve feedback on your Social Impact Report.

[View instructional video](#)

Review Feedback

Click on the green Update button or orange comment icon to review feedback.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/todo`. The dashboard has a dark sidebar with navigation options: true impact, TO DO (with a notification badge), REPORTS, REPORTS RATINGS, INVESTMENTS, ACCOUNT, and SIGN OUT. The main content area is divided into three sections:

- Funding Applications: 0**: All applications have been accepted!
- Investments to be allocated: 0**: All investments have been allocated!
- Reports to be submitted or published: 6**: A table with 3 rows and 3 columns.

Program or Initiative Name / Funding Term	Report Status	Content Status
1. SAMPLE Food Security Jul-01-2020 to Jun-30-2021	Final Report (TI Feedback Provided)	Overview, Intervention, Beneficiaries, Outcomes, Budget, Narratives. Includes a green 'Update' button.
2. SAMPLE: Teaching Equity in the Classroom Jul-01-2021 to Jul-01-2022	Initial Report (TI Feedback Provided)	Overview, Intervention, Beneficiaries, Outcomes, Budget. Includes a green 'Update' button.
3. Teaching for Equity and Justice Jul-01-2021 to Jul-01-2022	Initial Report (Not Yet Submitted for Review)	Overview, Intervention, Beneficiaries. Includes a green 'Update' button.

Edit and Resolve Feedback

Review feedback, make edits, and resolve by checking each Feedback checkbox.

The screenshot displays the True Impact Report Wizard interface for a report titled "Teaching Equity in the Classroom ('21 - '22)". The user is identified as "North Way" and the program manager is "Chelsea Takamine". The interface is divided into several sections:

- Left Sidebar:** A navigation menu with sections: "Report Builder", "DASHBOARD", "OVERVIEW" (with sub-items: Name, Description, Date Range, Logo, Stage), "INTERVENTION", "BENEFICIARIES", "OUTCOMES", "BUDGET", "IMPACT RECEIPT", and "SUBMIT". A "Return to Main Menu" link is at the bottom.
- Header:** "Teaching Equity in the Classroom ('21 - '22)", "North Way", and a user profile icon.
- Sub-headers:** "STAGE: Initial Report", "STATUS: TI Feedback Provided", "PROGRAM MANAGER: Chelsea Takamine".
- Main Content:**
 - Section: "Enter the name of the program you are reporting on".
 - Three feedback items with lightbulb icons and information icons:
 - "Do not include donor names, dates, or other descriptors unless they are part of the formal name."
 - "For galas, dinners, or other fundraisers, report on the charitable program(s) being funded and not the fundraising activity."
 - "Avoid addressing multiple programs in one report, as they are often rejected by funders as insufficiently detailed (instead, create a report for each program)."
 - Input field: "Teaching Equity in the Classroom" (68 characters remaining).
 - Validation message: "Page entries are valid."
 - Buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", "Save & Next >".
- Right Panel (Blue):**
 - Section: "True Impact Feedback:"
 - Section: "MARK AS RESOLVED:" with a checkbox and a yellow circle indicator.
 - Text: "Please use the program's formal name, so it easily recognizable by people both inside your organization and externally."
 - Section: "Additional Guidance" with expandable items:
 - "Reporting on galas, dinners, or other fundraisers"
 - "When to create multiple reports"
 - Close button: "Close" with a right-pointing arrow.
 - Chat icon: A speech bubble icon in a circle at the bottom right.

Submit Updated Report

Report progress

Submit Page

Not Yet Submitted for Review

Submit for Feedback

Awaiting Feedback

Awaiting Feedback

Feedback Provided

Submit

Awaiting Verification

Being Verified

Initial / Interim Published

Waiting...

Final Published

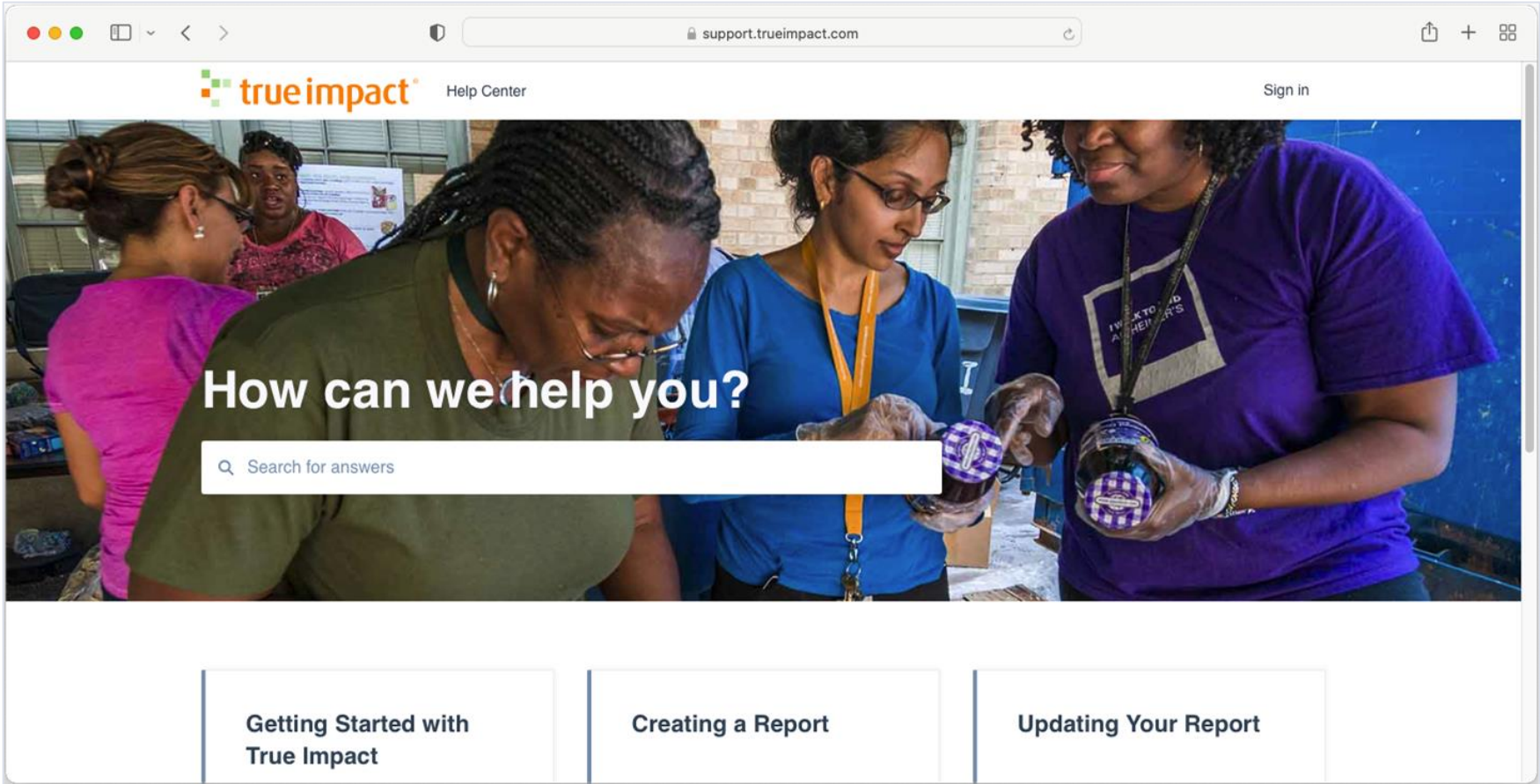
Finalize

Verified

Finalized

Find Guides and Resources

Find additional guides and resources at support.trueimpact.com.





Keep in Touch



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